



Annual Review: Taking an Honest Look at This Year

After interviewing [Guy Kawasaki](#) this month, I realized that my mantra is “Live on Purpose.” Everything I do here on Work Life Play is fundamentally undergirded by my passion for purposefully shaping our lives, our relationships, our rest, our finances, our friendships, our careers and our adventures.

WE HAVE TWO ROUTES: CHOOSE A LIFE WE WANT OR ALLOW LIFE TO HAPPEN TO US AND BE SURPRISED WITH THE RESULTS.

We can't guarantee a result or an outcome, but we can increase the odds of creating an effect we want. Living on purpose requires our active engagement and minimizes the number of surprises.

My friend sent me this quote from poet David Whyte,

"Ten years ago I turned my head for a moment and it became my life."

Instead of turning our head, let's take an honest look at where our actions, our beliefs, and behaviors are leading us.

Year in review-Taking an honest look

I'm taking a look back over my key life accounts to measure and evaluate how effectively I've achieved my goals in 2017? When I use words like "evaluate" and "measure" I am not talking about charts and graphs. I'm talking gut-level response.

It is a lot easier to make small course-corrections now than waiting a decade and attempting to repair a big misstep. Goodness compounds over time and neglect has sneaky repercussions. Taking an annual inventory enables us to overlay our pathway walked with our intended route.

- Where were we on target?**
- Where did we lose the trail for a while?**
- Where are we heading next?**
- What are detours not worth repeating?**

The goal is progress, not perfection and writing out your annual review gives you the ability to watch your progress over time.

How I start my annual review

I write down these questions (see below) in my journal and on big sketch pad sheets on my office wall. The combination helps me to visualize my life categories and easily highlight account deficits.

I start by hanging a couple of blank pages on my wall and title each page by life account:

1. **Relationships**
2. **Work**
3. **Physical fitness**
4. **Spiritual wellness**
5. **Money**
6. **Adventure.**

Below are the questions I consider by category and life account. These are not in priority of importance, but I have numbered them for simplicity. Consider the below exercise as a tool to get you started.

#1 Relationships

- **Marriage**
- **Kids**
- **Friendships**
- **Co-workers**
- **My community**

Questions I ask about my Relationships

1. Are we connected?
2. Do we enjoy each other?
3. How did I prioritize them in my daily life?
4. How did I invest my time and attention into these relationships?
5. What do I hope they would say about our relationship?
6. What shared experiences did we share together this year?
7. What didn't go so well?
8. Next year, what do I want to do differently?
9. Specifically, what will I do about it?

#2 Work

1. Am I proud of the work I am doing?
2. Would my twenty-year-old self-be proud of the work I am doing?
3. Am I honorable in all of my affairs?
4. What did I accomplish?

5. What am I most proud of?
6. What do I regret?
7. How could I have done it differently?
8. What surprised me?
9. What went better than I expected?
10. What risks did I take?
11. What disappointed me?
12. How did I exercise personal empowerment in new ways this year?
13. Where did I play it safe-hold back?
14. What do I want to do differently next year?

#3 Physical fitness

1. How do I feel?
2. How is my overall fitness? Do I feel my age-younger-older?
3. Was I consistent? Infrequent?
4. What am I proud of?
5. What do I specifically want to improve?

#4 Spiritual fitness-wellness

1. Are we connected?
2. If not why? What's in the way?
3. How consistent is my daily routine?
4. What am I proud of?
5. What were my favorite spiritual moments?

#5 Finances

1. How much money did I save?
2. What is my net worth now v.s. last year?
3. What did we do for fun?
4. What did we do for good? Who did we help?
5. Where do I feel behind?
6. What new progress did I make this year?
7. What do I need to do differently next year?

#6 Adventure

1. What significant experiences did I go on?
2. How did I pursue adventure in my everyday life?
3. What new local micro-adventures did I go on?
4. Who did I pursue adventure with? How did it go? Would I go with them again?
5. What adventures am I cooking up for next year? Big and Small.

Resources

[Chris Guillebeau's Annual Review-The Art of Non-Conformity](#)

Chris generates an annual review post every December. He is a master at accomplishing some big things like traveling to every country in the world by age 30 and writing five best-selling books.

[Living Forward: A Proven Plan to Stop Drifting and Get the Life You Want](#)

By Michael Hyatt and Daniel Harkavy, this life hack is a very tactical translation from your goals and desires to practical daily steps to living forward.

[Check Engine Lights and Life Dashboards](#)

Creating a life dashboard is a simple first step applying similar ideas to rating your life accounts with a Green, Yellow, or Red color coding. This is the easiest place to start if you've never done anything like an annual review.